



# ECONOMIC IMPACT OF TOURISM REPORT

2019

explore  
the  
**BRUCE**





# TABLE OF CONTENTS

A. The Bruce Story .....	1
B. The Methodology / Research .....	3
C. 2019 Tourism By The Numbers .....	5
- Economic Impact Numbers .....	5
- Business Survey Results .....	7
- Visitor Survey Results: Onsite Surveys .....	11



# THE BRUCE STORY

We are the explorers. The dreamers who take roads less travelled. Those who turn alternatives into sustainable choices. Those who see tried and true as an invitation to try something new. Here's to children who look under rocks. And parents who help with the lifting. Here's to active, inquiring minds, and those with the vision to look beyond obstacles.

Here's to celebrating business innovation – and just as important, to exploring farm life in the morning, beach life in the afternoon and bright starry skies all night long. Here's to the explorers – here's to us. Bruce County is where those roads less travelled become a journey. In life, in our work, in our communities and in how we spend our days together.

**BE AN EXPLORER...**





Bruce County welcomes visitors, residents, and entrepreneurs to explore life in Bruce County. This report analyzes the important role visitors play in our local economy.

## WHO IS A VISITOR?

The definition of “visitor” is someone who has visited Bruce County within the past 12 months and has travelled more than 40 kilometres.

# THE METHODOLOGY / THE RESEARCH

2019 marks the second year for the Economic Impact of Tourism Report. In 2018, the Bruce County Economic Development team worked to develop a standardized framework for the collection and analysis of tourism data. This framework integrates data from multiple, existing sources to develop a set of Key Performance Indicators (KPIs) that is used to evaluate the economic impact of tourism on Bruce County and the effectiveness of local efforts to promote regional tourism.

The data collected in 2018 provides a baseline against which change can be measured. The year-over-year changes highlighted in 2019 - and in future assessments - give entrepreneurs and investors meaningful, accurate data to support their business decisions.

Data is collected annually from three sources\*:

- 1 Partner organizations, such as Parks Canada, Ontario Parks, Ontario Ferries, and more
- 2 Survey of regional businesses that interact directly with visitors (conducted by Bruce County)
- 3 Survey of randomly selected visitors (conducted by Bruce County)

\* Additional survey data is collected from across Ontario every three years using an outside vendor."



2019

## ECONOMIC IMPACT OF TOURISM

Visitors

**2.5**  
MILLION

2.5 MILLION IN 2018



Over **95%** are likely to visit Bruce County again next year.

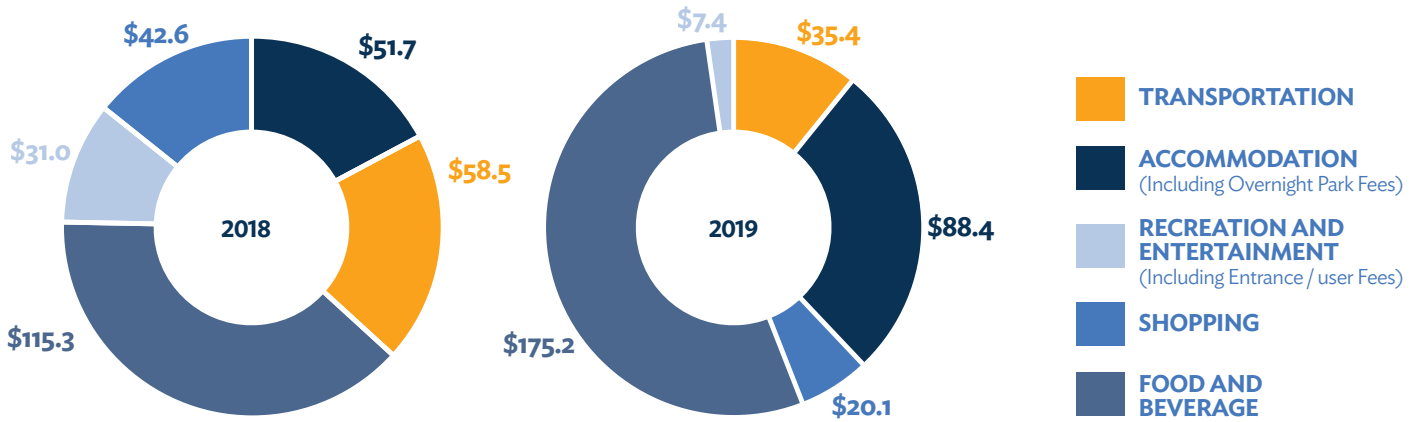
COMPARED TO **90%** IN 2018

Economic Impact  
Of Tourism

**\$326.7**  
MILLION

\$299.1 MILLION IN 2018

### Total Visitor Spending (in millions of dollars)



### Economic Impact for Bruce County

	2018				2019			
	DIRECT	INDIRECT	INDUCED	TOTAL	DIRECT	INDIRECT	INDUCED	TOTAL
Gross Domestic Product (\$m)	121.9	21.3	30.8	174.0	155.9	28.1	42.3	226.3
Labour Income (\$m)	62.9	13.9	18.6	95.4	88.9	18.2	25.5	132.7
Employment (In Jobs)	1,905	208	221	2,333	2,669	262	293	3,224





2019

## BUSINESS SURVEY RESULTS

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One of the steps of the process is to complete an annual survey of regional businesses that intersect directly with visitors to gather an estimate of tourist activity. Although subject to sample error, it can provide data on a broader set of activity and with sufficient response rates produces estimates on categories of expenditures.

It should be noted that although fewer businesses completed the survey in 2019, the number of surveys completed exceeds the threshold number required to achieve 90% accuracy. This is the same level of accuracy measured in the 2018 business surveys.

The businesses were contacted by email or by phone and explained the objectives of the survey. If they agreed to complete the survey, they were given the choice to complete it online or over the telephone.

More than half of the businesses surveyed are collecting or tracking data for their business. Of these, the most commonly collected data is retail, point-of-sale data or cash register receipts; food and beverage sales; and hotel occupancy rates.



## BUSINESS SURVEY RESULTS HIGHLIGHTS:



Business report that on average  
**visitors spend about \$224**  
at their establishment in 2019 vs. \$130 in 2018,  
but this figure varies by business type.

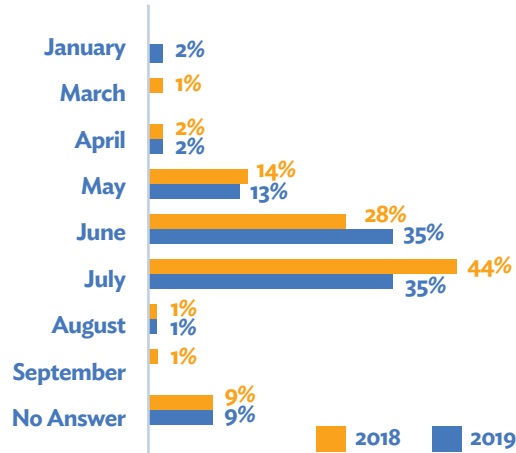
**Peak season started in June for 28%**  
of businesses surveyed in 2018;  
**grew to 35%** in 2019, indicating  
peak tourism season began earlier in 2019.



**Peak season ended for 40%** of businesses in September in 2018;  
**grew to 53%** in 2019, indicating peak  
tourism season ended earlier in 2019.

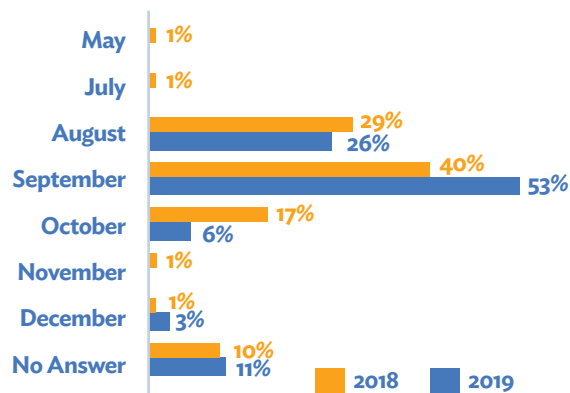
# Peak Tourism Season:

## When does your peak season start?



In 2019, **7% more businesses reported peak season starting in June** compared to 2018; however **13% more stated their peak season ended in September** vs 2018. Noting changes in the peak tourism season is a useful way to monitor and encourage local efforts to promote shoulder and off season visits. \* Months under 1% not listed.

## When does your peak season end?



## Number of **Visitors** and **Sales Amount**

**Number of Visitors  
– Peak Season (mean)**

**1,224** (2018)  
**1,503** (2019)

**Number of Visitors  
– Off Season (mean)**

**253** (2018)  
**333** (2019)

**Average Visitor Dollar  
Amount Spent (mean)**

**\$131** (2018)  
**\$232** (2019)

## Number of **Visitors** and **Sales Amount** – by Types of Business

TYPES OF BUSINESS	NUMBER OF VISITORS – PEAK SEASON		NUMBER OF VISITORS – OFF SEASON		AVERAGE VISITOR DOLLAR AMOUNT SPENT (INCL. o)	
	2018	2019	2018	2019	2018	2019
Accommodation Services	505	680	83	171	\$209	\$502
Food Services and Drinking Places	1,111	1,988	430	574	\$25	\$25
Clothing and Clothing Accessories Stores	6,987	5,323	239	24	\$90	\$106
Amusement, Gambling and Recreation Industries	967	1,722	211	523	\$66	\$39
Food and Beverage Stores	1,147	1,519	420	50	\$39	\$17
Scenic and Sightseeing Transportation	-	4,275	-	1,288	-	\$91
Miscellaneous Store Retailers (Art galleries & gift, souvenir and novelty stores)	-	419	-	106	-	\$41
Health and Personal Care Stores	205	92	125	30	\$38	\$28
Rental and Leasing Services	250	78	40	15	\$1,210	\$128
General Merchandise Stores	946	1,000	464	-	\$97	\$50
Food Manufacturing	2,372	150	68	10	\$34	\$60
Garden Equipment and Supplies	300	-	12	-	\$50	\$25

2018 2019

# VISITOR SURVEY RESULTS: ONSITE SURVEYS

In 2019, 522 random, onsite visitor surveys were conducted at various events, festivals, parks, tourism centres, and more. Compared to 2018, the 2019 visitor surveys reflect more visitor spending per trip (average increase of \$277/trip) but a decrease in the number of overnight stays by 15%.

## ONSITE VISITOR SURVEY RESULTS HIGHLIGHTS:

**Visitors spend** for duration of trip

(excluding \$0): **\$1,509** in 2018



and

**\$1,786** in 2019

**Visits for personal**

**reasons: 98%** in 2018

and **95%** in 2019



**Overnight stays:**

**77%** in 2018

and **61%** in 2019



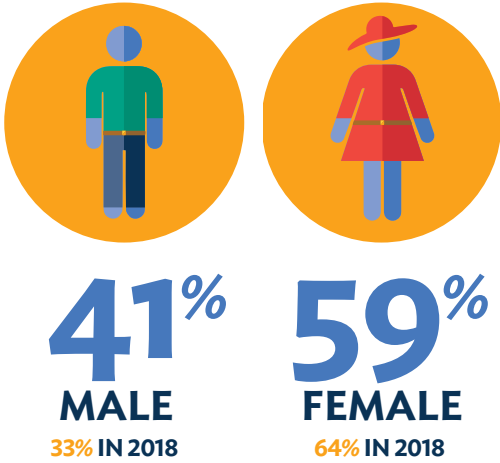
**Satisfied with their**

**trip to Bruce County:**

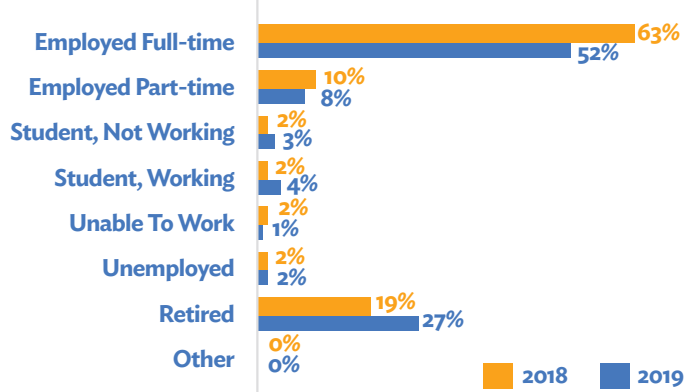
**86%** in 2018 and **90%** in 2019

# Visitor Demographics

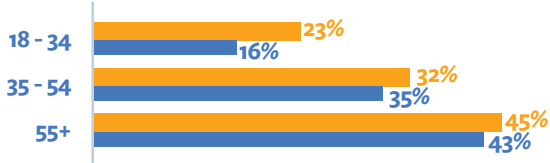
## Gender



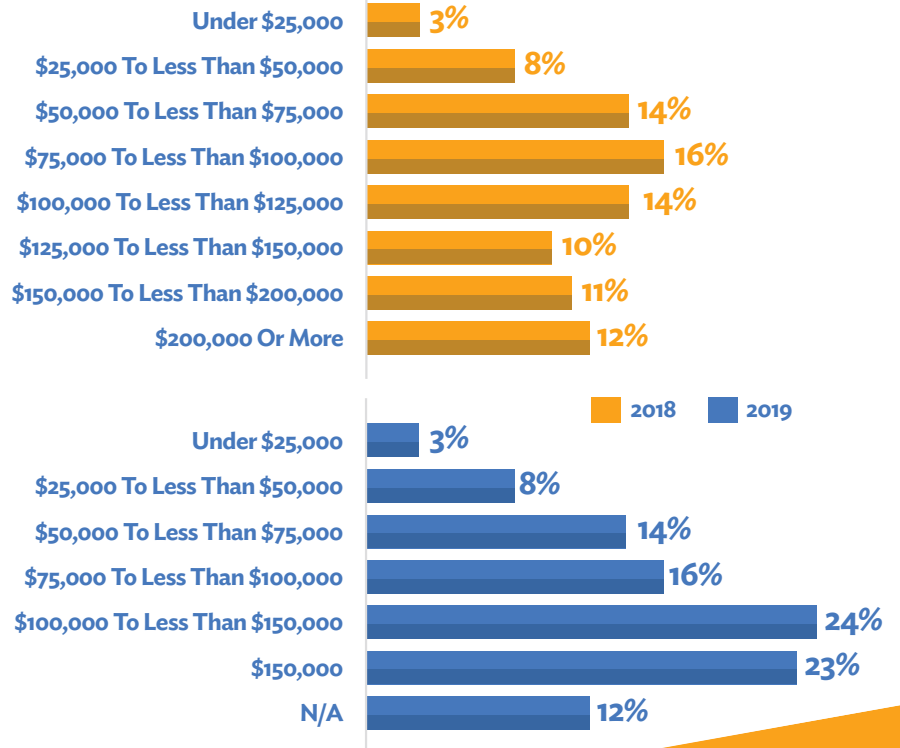
## Employment



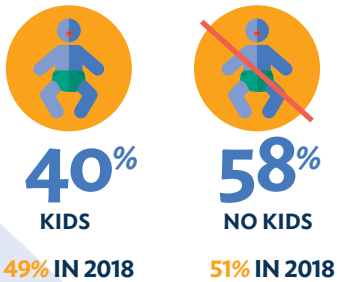
## Age



## Income



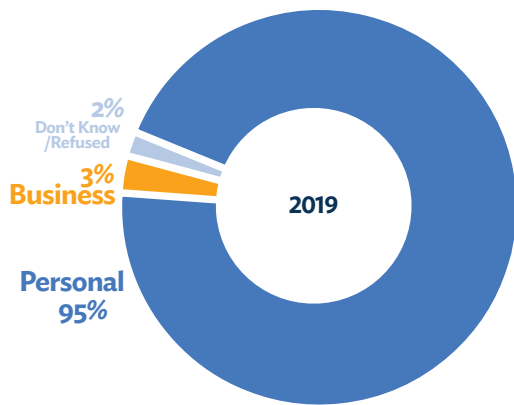
## Kids In Household



# What Was the Reason for Your Most Recent Trip to Bruce County?

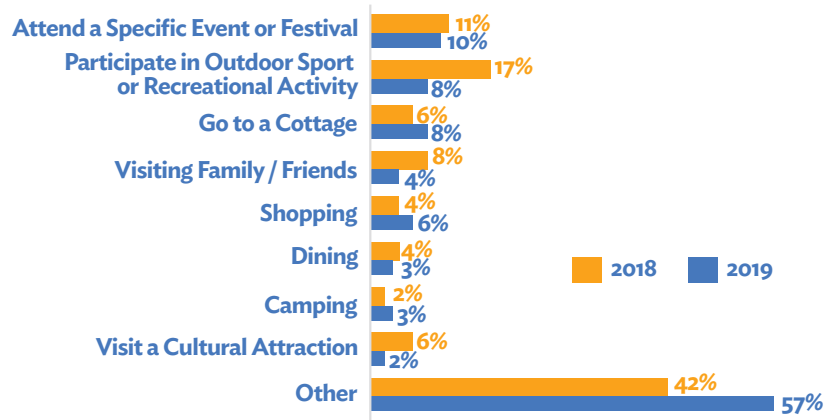
The primary reason for personal travel in 2019 was to attend a specific event or festival; in 2018 the primary reason for travel was to participate in outdoor sport or recreational activity.

## What Was The Reason For Your Trip?



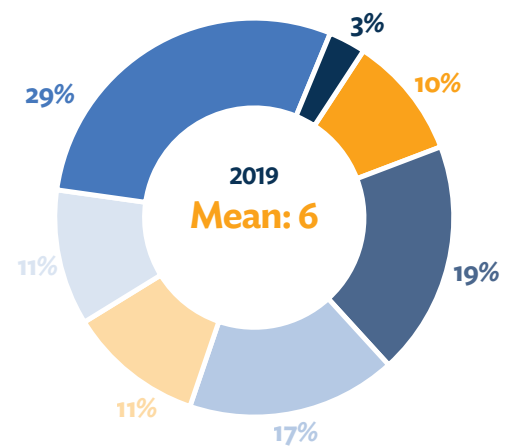
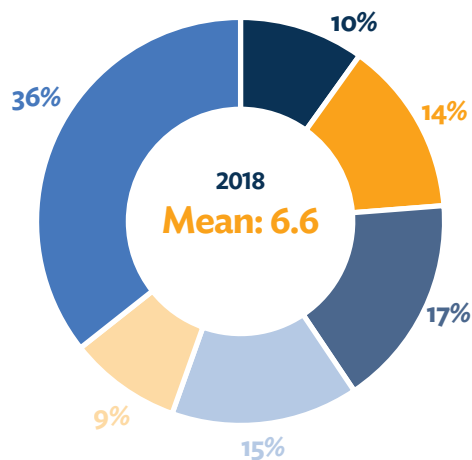
2018 RESULTS SIMILAR

## What Was The Primary Reason For Your Personal Trip?



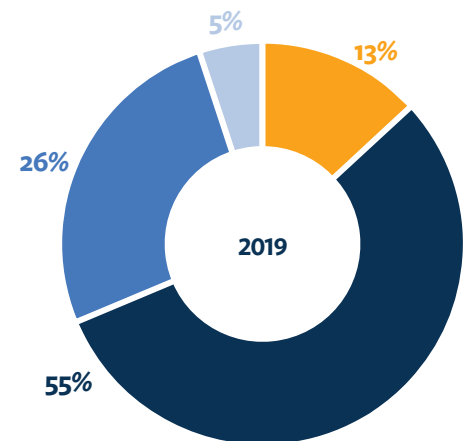
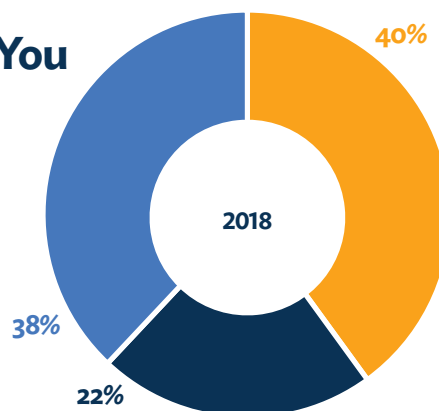
## Number of Trips Taken in Past 12 Months

On average, visitors have made 6 visits to Bruce County in 2019.



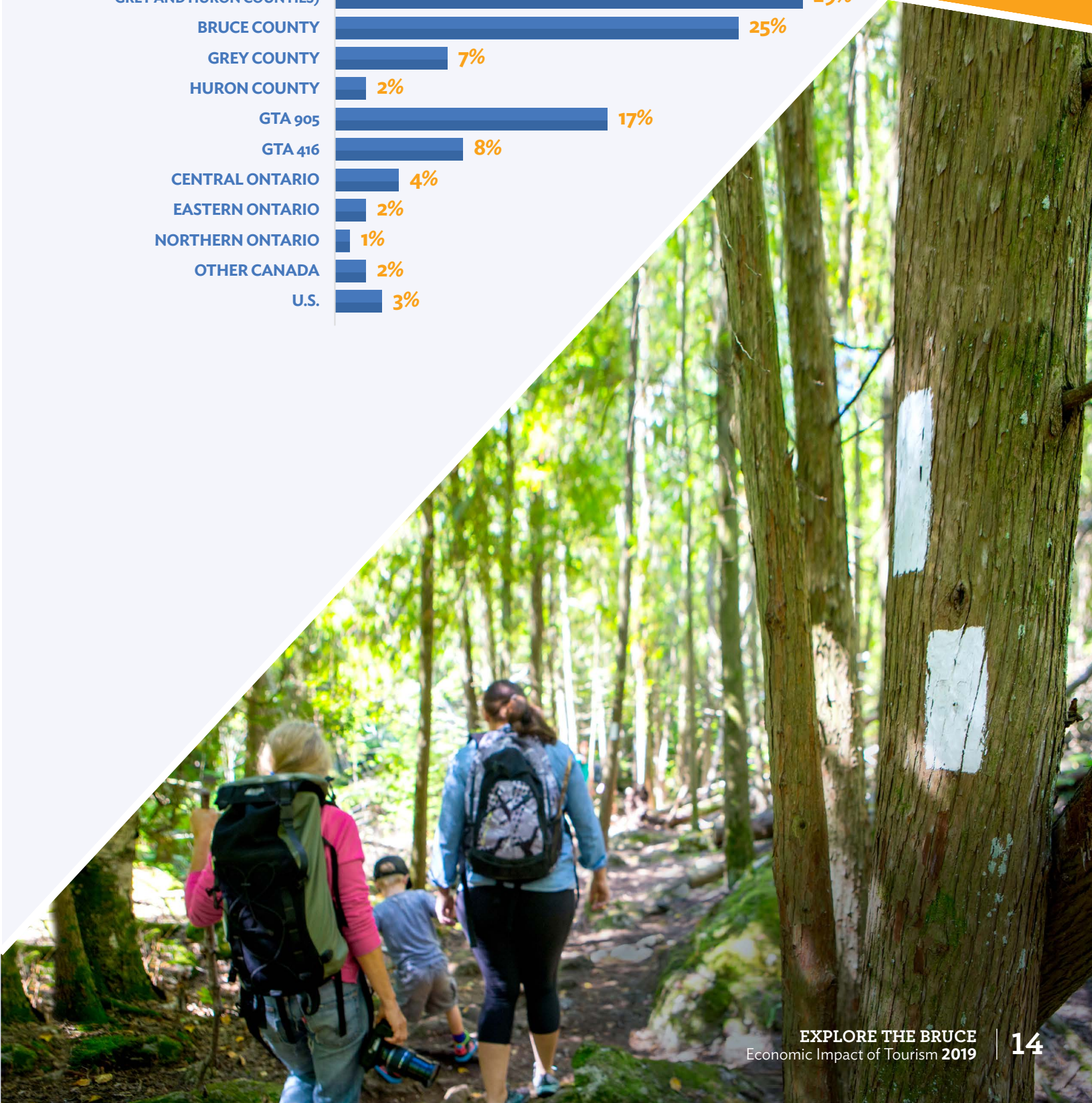
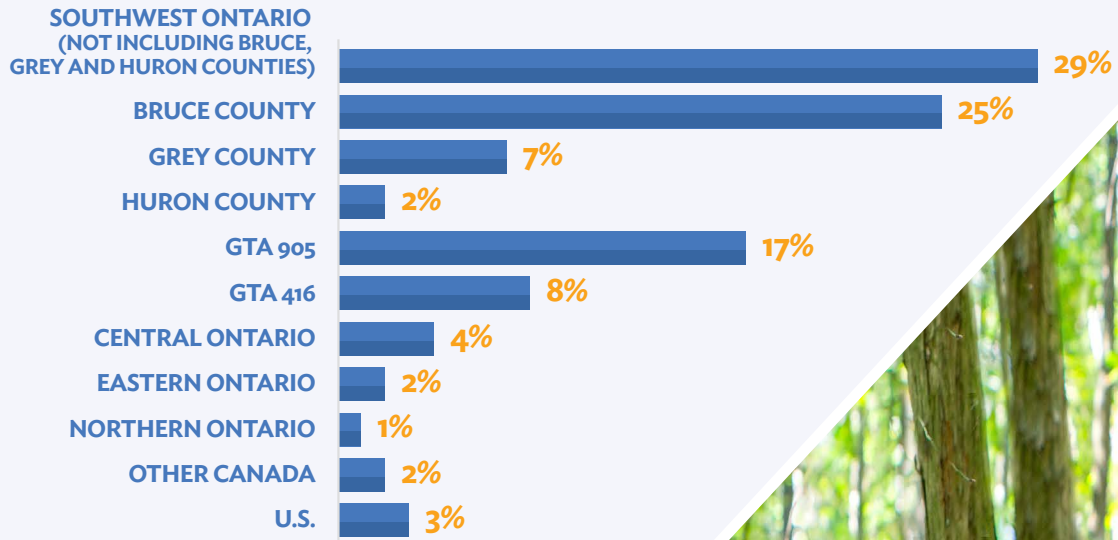
## What Time of Week Did You Visit Bruce County?

When it comes to the time week of the visit, more than half visited over a weekend, about one in ten visited during the week and one quarter during the week and a weekend.





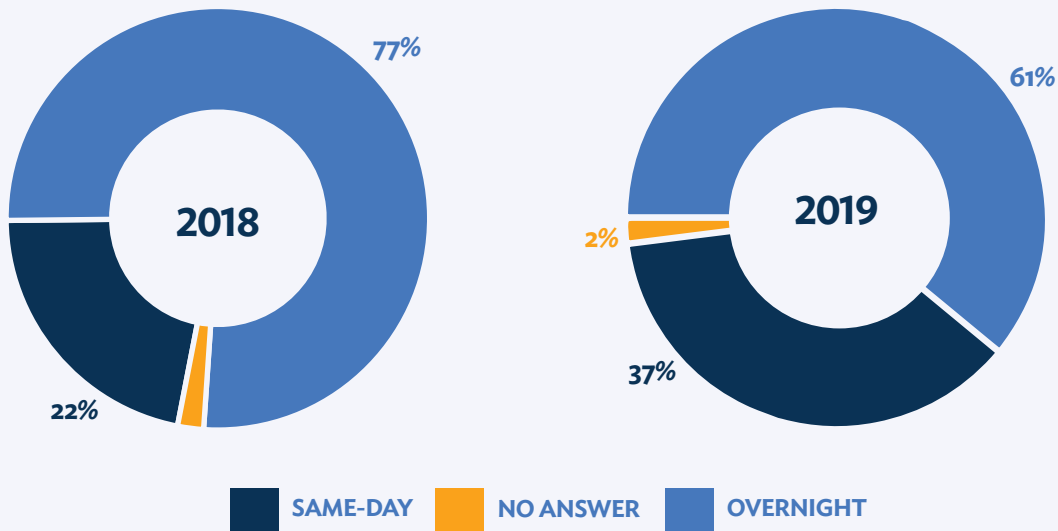
## Where Visitors Are From



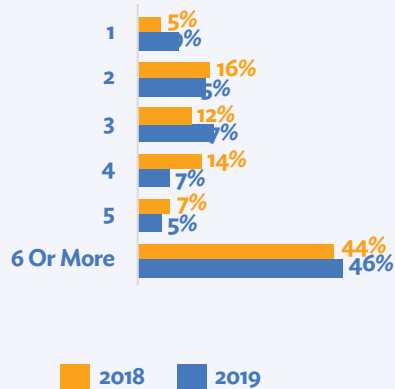
# Visitors Staying Overnight

In 2018, 77% of surveyed visitors were overnighters. In 2019, this dropped to 61%.

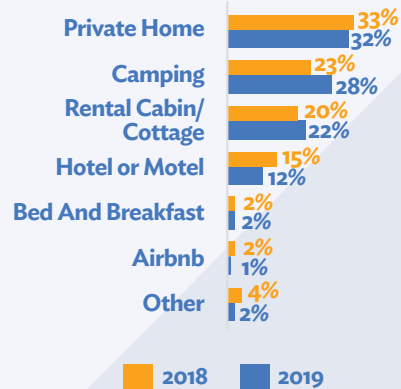
## Same-day or Overnight?



## Number of Nights Stayed

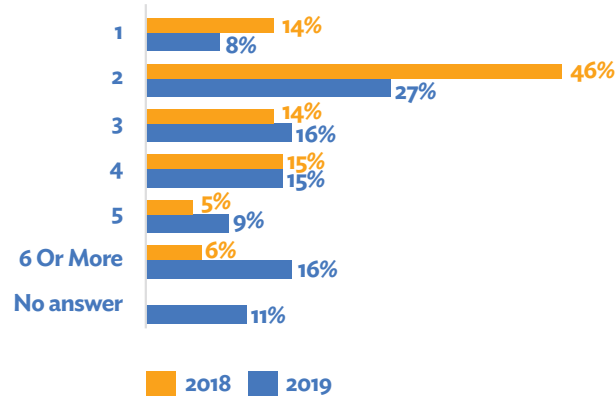


## Types of Accommodation



## How Many People Went on This Trip?

Just over one in ten visitors travelled on their own, almost three in ten visited with one other person and three in ten with at least 3 people in their party.

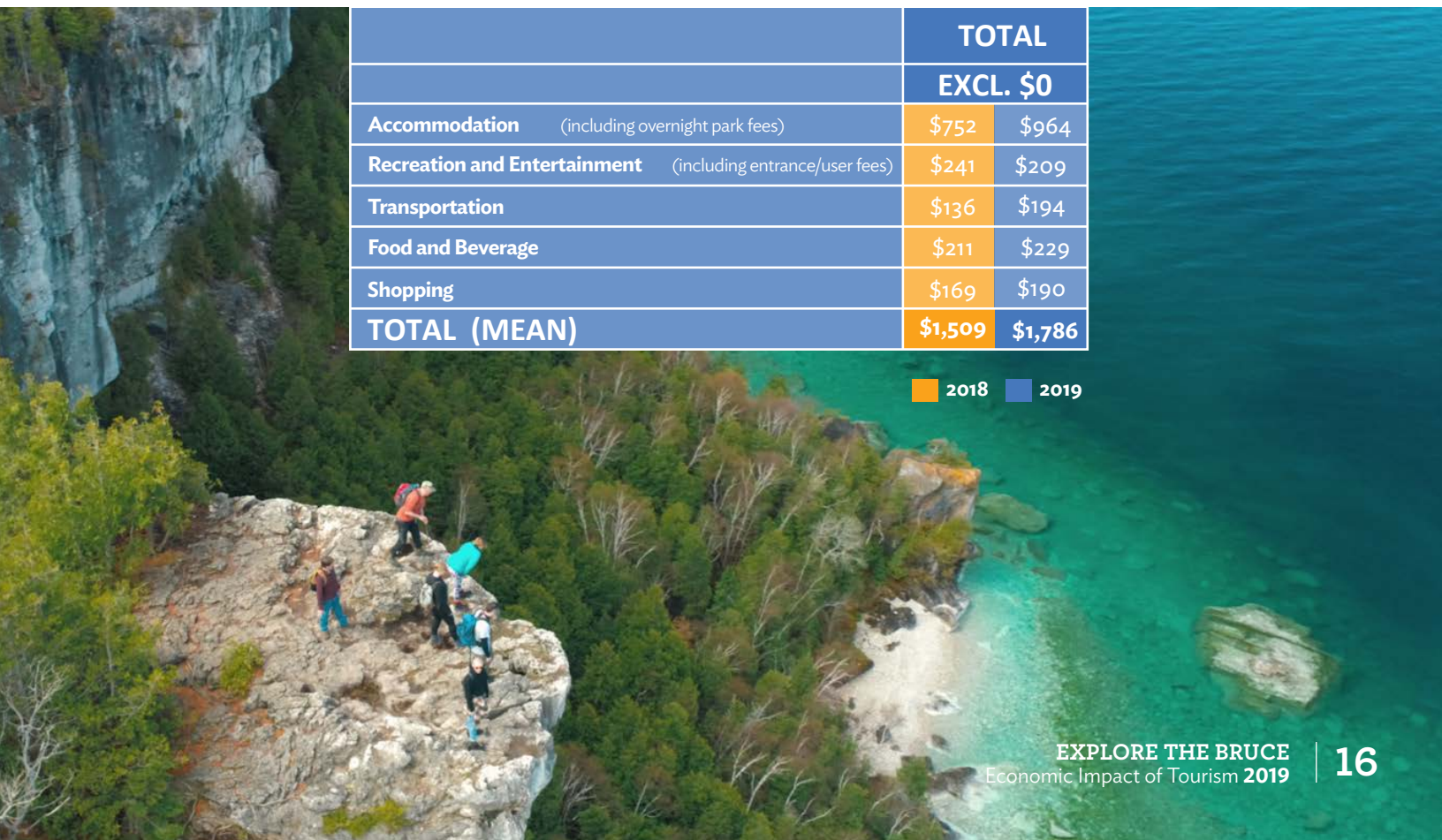


## Total Amount Spent During Entire Stay in Bruce County

### MEAN TOTAL SPENDING

	TOTAL	
	EXCL. \$0	
Accommodation (including overnight park fees)	\$752	\$964
Recreation and Entertainment (including entrance/user fees)	\$241	\$209
Transportation	\$136	\$194
Food and Beverage	\$211	\$229
Shopping	\$169	\$190
<b>TOTAL (MEAN)</b>	<b>\$1,509</b>	<b>\$1,786</b>

2018 2019



## Tourism Expenditure by Municipality (thousand)

	ARRAN-ELDERSLIE	BROCKTON	HURON-KINLOSS	KINCARDINE	NORTHERN BRUCE PENINSULA	SAUGEEN SHORES	SOUTH BRUCE	SOUTH BRUCE PENINSULA
<b>Accommodation</b>	7,331	10,487	4,842	13,491	21,493	15,254	3,260	12,343
<b>Recreation and Entertainment</b>	455	303	217	316	5,415	274	183	261
<b>Transportation</b>	4,091	4,057	3,659	4,204	7,477	5,339	1,460	5,158
<b>Food and Beverage</b>	17,174	17,951	7,664	29,269	39,697	32,217	7,248	24,014
<b>Shopping</b>	1,712	10,800	939	1,666	1,825	1,410	653	1,101
<b>TOTAL (MEAN)</b>	30,762	43,598	17,320	48,946	75,906	54,493	12,804	42,877
	9%	13%	5%	15%	23%	17%	4%	13%

## Average Amount Spent During Entire Stay – by Age and Income

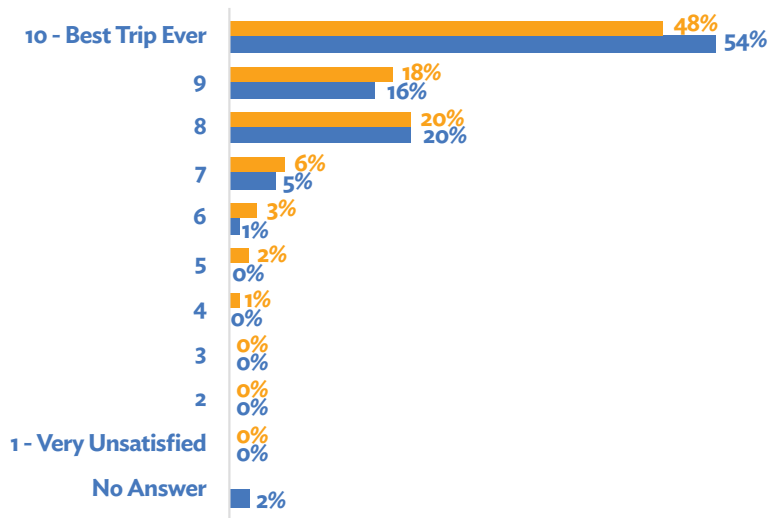
Mean (Including '0') <i>All Respondents</i>	AGE					
	18 - 34		35 - 54		55+	
	93	84	260	184	146	225
<b>Accommodation</b>	\$466.1	\$200.7	\$602	\$354.7	\$793.4	\$329.6
<b>Recreation and Entertainment</b>	\$152	\$63.2	\$213.4	\$103.5	\$290.3	\$116.6
<b>Transportation</b>	\$99.3	\$49.5	\$125.2	\$116.6	\$159	\$101.8
<b>Food and Beverage</b>	\$164	\$101	\$227.1	\$171.6	\$194.5	\$168.5
<b>Shopping</b>	\$104.2	\$54.9	\$145	\$108.8	\$186	\$102

2018 2019





## How Satisfied With Most Recent Trip to Bruce County?

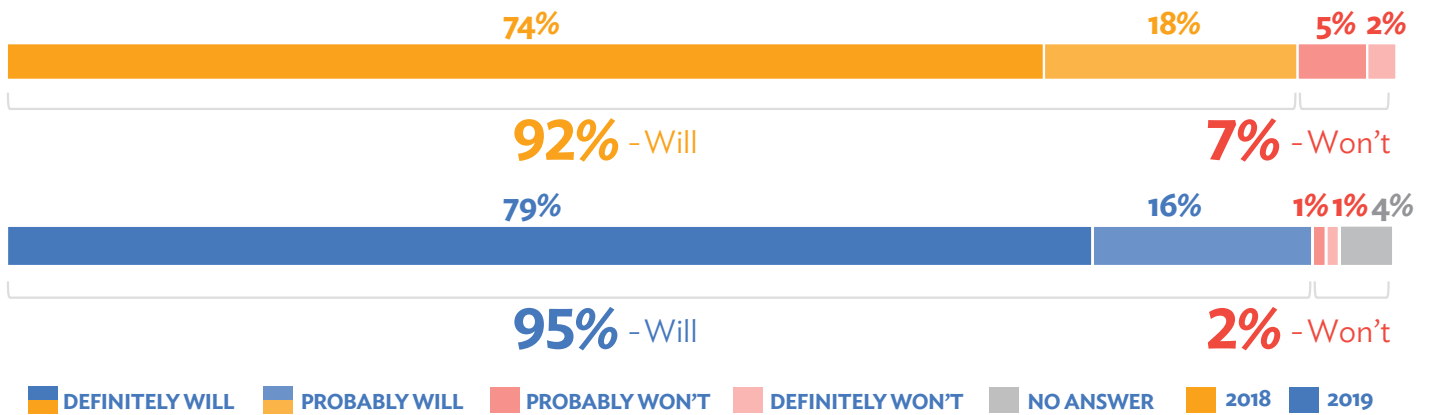


Almost nine in ten **(90%)** visitors rated their satisfaction between 8 and 10 in 2019 compared to **(86%)** in 2018.

2018 2019

# How Likely Are You to Visit Bruce County Next Year?

Three-quarters (79%) of visitors say they “definitely will” visit Bruce County next year.



\*due to rounding it may not add up to 100%





